



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 18, 2005

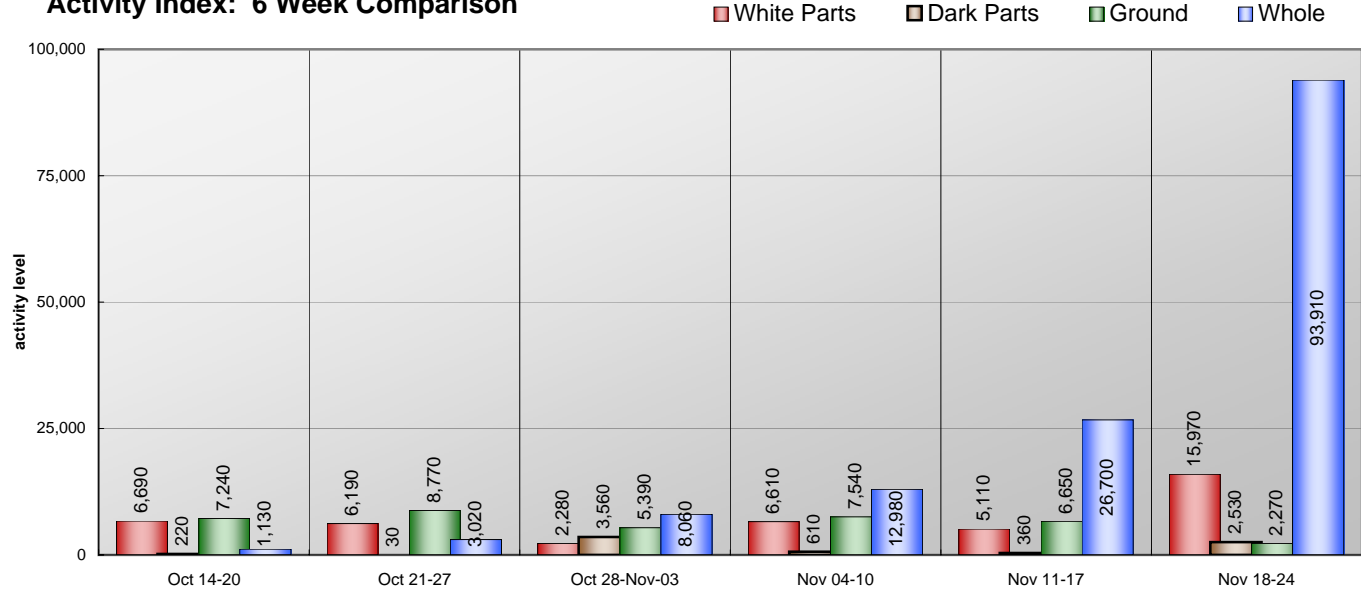
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/18 thru 11/24.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY

	THIS WEEK		LAST WEEK	
Feature Rate 1/	100.0% of 16,700 outlets		70.2% of 16,700 outlets	
Special Rate 4/	23.6%		11.7%	
Activity Index 2/	114,680		38,820	
3/	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:				
Fresh - Hens	23,590	1.16	840	1.27
" - Toms	22,970	1.15	640	1.20
Frozen - Hens	23,890	0.72	12,590	0.74
" - Toms	23,460	0.71	12,630	0.72
PARTS:				
Breast:				
Bone-in, whole				
Fresh	5,510	2.25	550	2.08
Frozen	8,380	1.43	1,930	1.37
Hotel Style				
Fresh				
Frozen				
Split, bone-in				
Fresh			70	3.99
Rotisserie	1,780	7.96	30	7.99
Boneless, whole				
			60	3.49
Cutlets	180	3.99	1,420	3.96
Strips	120	3.99	430	4.21
Tenders			620	3.88
DRUMSTICKS				
Drumsticks	990	1.29		
Thighs	380	1.12		
Wings	970	1.33		
NECKS				
Necks				
Smoked Drumsticks	190	1.54	210	1.59
Smoked Wings			150	1.64
Smoked Necks				
GROUND TURKEY:				
	2,270	2.79	6,650	2.66
Patties	160	2.42	360	2.50
Sausage	730	2.29	1,950	2.39
85% lean	130	1.65	1,160	1.71
93% lean	500	2.21	1,590	2.17
Breast	750	3.94	1,590	4.19

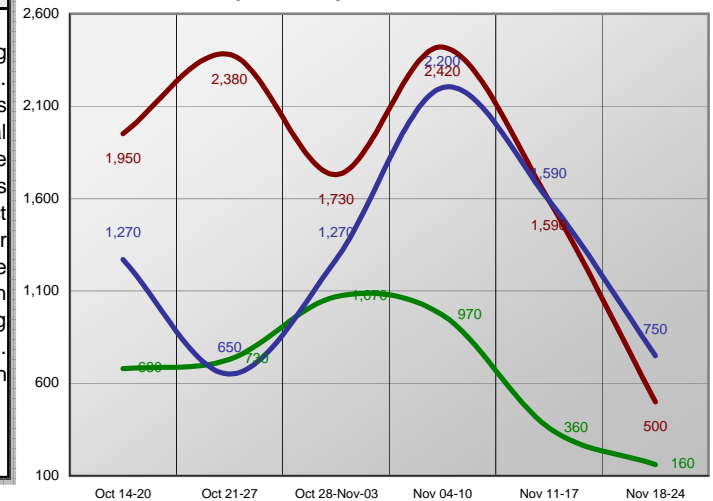
Activity Index: 6 Week Comparison



Turkey Featuring - 11/18 thru 11/24

The biggest retail sales week of the year for turkey is in full swing with 100% of sampled stores promoting turkey for Thanksgiving. Feature activity is up 300% from last week lead by whole birds as fresh bird ads are out in force with some competition by seasonal chicken and ham items noted. Ad prices for frozen birds are slightly lower on average than last week but are featured twice as much as last week. Countless promotional gimmicks are in effect but the lowest advertised price with no conditions is \$0.19 per pound found in both the East and West regions. Many stores have extended their normal ad cycles to cover the period through Thanksgiving. Feature activity for whole bone-in breast, including rotisserie, is up over 600% from last week at higher price levels. Ground turkey is virtually shut out of the circulars this week with minimal feature activity noted.

Ground Turkey Activity



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: FEATURE RATE: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/: ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300) **3/: STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/: SPECIAL RATE:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



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	EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV)			CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI)			WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)		
Feature Rate 1/ Special Rate 2/ Activity Index 3/	100.0% of 8,200 sampled outlets 21.4% of stores w/ no-price promotions Activity Index = 64,850			100.0% of 4,900 sampled outlets 22.4% of stores w/ no-price promotions Activity Index = 25,200			100.0% of 3,600 sampled outlets 30.3% of stores w/ no-price promotions Activity Index = 24,630		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	0.50 - 1.79	14,000 1.14		0.59 - 1.69	4,670 1.15		0.89 - 1.69	4,920 1.22	
" - Toms	0.50 - 1.69	13,770 1.13		0.59 - 1.69	4,530 1.14		0.89 - 1.69	4,670 1.21	
Frozen - Hens	0.19 - 1.29	13,350 0.74		0.29 - 1.39	5,990 0.70		0.19 - 1.39	4,550 0.68	
" - Toms	0.19 - 1.29	12,970 0.73		0.29 - 1.39	5,980 0.69		0.19 - 1.39	4,510 0.66	
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.69 - 2.99	3,400 2.23		1.69 - 2.49	770 2.13		1.99 - 2.69	1,340 2.34	
Frozen	0.99 - 2.69	3,970 1.42		0.98 - 2.49	1,800 1.48		1.19 - 1.79	2,610 1.41	
Hotel Style									
Fresh									
Frozen									
Split, bone-in									
Fresh									
Rotisserie	4.99 - 7.99	380 7.17		7.99	350 7.99		5.99 - 8.99	1,050 8.24	
Boneless, whole									
Cutlets	3.99	180 3.99							
Strips	3.99	120 3.99							
Tenders									
Drumsticks	0.99 - 1.29	260 1.15		0.99 - 1.29	240 1.01		1.49	490 1.49	
Thighs	1.29	140 1.29		0.99 - 1.29	240 1.01				
Wings	0.99 - 1.59	260 1.32		0.99	220 0.99		1.49	490 1.49	
Necks									
Smoked Drumsticks	1.39 - 1.59	170 1.56		1.39	20 1.39				
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.24 - 2.50	140 2.41		2.50	20 2.50				
Sausage	2.19 - 2.49	690 2.30		1.99 - 2.39	40 2.17				
85% lean				1.65	130 1.65				
93% lean	1.99 - 2.49	500 2.21							
Breast	3.15 - 3.99	550 3.92		3.99	200 3.99				

Note: See page 1 for explanatory notes.